

Message Text

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SUBJECT: OPERATIONS MARKET RESEARCH: AVIONICS, AVIATION
& GROUND SUPPORT EQUIPMENT, FRANCE, GERMANY, ITALY &
NETHERLANDS

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1. TABLE 1: MARKET SIZE STATISTICS WERE PROVIDED FOR
NETHERLANDS (SEE PAGE 8 OF STUDY) ALBEIT THEY WERE ASA
ESTIMATES BASED ON END-USER SALES. FOR NETHERLANDS AND
OTHER COUNTRIES, AIRBORNE EQUIPMENT AND GROUND INSTAL-
LATIONS WERE COVERED; GERMAN STUDY HAS ADDITION OF AIR-
CRAFT COMPONENTS, WHICH DO NOT APPEAR TO HAVE BEEN RE-
QUIRED IN 3.21.01 OF SPECS. NEITHER WERE AIRPORT,
TERMINAL AND GROUND SUPPORT EQUIPMENT; AND AVIATION
ENGINES REQUIRED (SEE 3.21.01 OF SPECS).

2. TABLES 2 & 3: SUBJECT COUNTRIES' IMPORT STATISTICS,
AS STATED BY CONTRACTOR IN REFTTEL, ARE NOT AVAILABLE IN
SUFFICIENTLY DETAILED FORM TO SEPARATE OUT AVIATION
ELEMENTS RELIABLY (SEE 3.22.01). HOWEVER, TABLE 2 IS
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INCLUDED IN FRENCH AND NETHERLANDS STUDIES; AND TABLE 3
IN UPDATE OF GERMAN STUDY.

3. CONTRACTOR NOW MAKES FOLLOWING COMMENTS REGARDING
TABLE 1, I.E. MARKET SIZE, IN GERMANY:

1) THE DOMESTICALLY PRODUCED GROUND INSTALLATION
AVIONICS AS SHOWN ARE EXCEPTIONALLY HIGH, AND THE

FIGURES IN CONTRACTOR'S VIEW REFLECT A MAJOR ELEMENT OF NON-AVIATION EQUIPMENT BUILT BY WEST GERMAN INDUSTRY WHICH OPERATES ON A LARGE SCALE.

2) ONLY A SMALL EXPORT BUSINESS IN AVIONICS, AIRBORNE AND GROUND, HAS BEEN DEVELOPED IN GERMANY, AND ANY DOUBTS AS TO THE FIGURES RESTS UPON THE PROPORTION OF THE PRODUCTION OF THE INDUSTRY WHICH IS GENUINELY GROUND AVIATION INSTALLATIONS.

3) THE WEST GERMAN AIRPORTS ARE HOWEVER EXTREMELY WELL EQUIPPED AND AT A LEVEL OF INVESTMENT WELL ABOVE U.K. AND FRENCH STANDARDS. MOREOVER, THE NUMBER OF INTERNATIONAL AIRPORTS IS HIGHER THAN IN THESE OTHER COUNTRIES, EVEN THOUGH PASSENGER AND CARGO THROUGHPUT IS COMPARABLE. HOWEVER, THE ASSESSMENT OF THE PROPORTION OF THE PRODUCTION WHICH IS ABSORBED BY THE HOME MARKET AFTER DEDUCTION OF EXPORTS IS MOST DIFFICULT TO MAKE SINCE GUIDE-LINES ARE LACKING. NO OFFICIAL DATA IS AVAILABLE AND INDEED THE WEST GERMAN GOVERNMENT CONSIDER THEIR OWN ASSESSMENTS TO BE CONFIDENTIAL IN THIS FIELD.

ALSO THE KEY MANUFACTURERS SUCH AS SIEMENS, TELEFUNKEN AND STANDARD ELECTRIC DO NOT KEEP RECORDS SPLIT IN THE WAY REQUIRED FOR A SURVEY SUCH AS THIS. THE RECORDS OF THE WEST GERMAN AEROSPACE INDUSTRIES ASSOCIATION (CATEGORY 3) UNDOUBTEDLY UNCLASSIFIED

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INCLUDE A MAJOR ELEMENT OF NON-AVIATION PRODUCTION.

4) CONTRACTOR HAS NOTED BEFORE THE LACK OF CERTAINTY IN SUCH ESTIMATES WHILE RECOGNISING IN THIS CASE THAT THE ASSESSMENT PROBABLY ERRS ON THE HIGH SIDE.

5) CONTRACTOR ALSO NOTES THAT THE AUTHORS OF THE PREVIOUS WEST GERMAN SURVEY COMMENTED IN SIMILAR TERMS.

6) ALTHOUGH ESTIMATES OF AIRCRAFT AND ENGINE COMPONENTS, PRODUCED DOMESTICALLY AND IMPORTED INTO WEST GERMANY, WERE DERIVED FOR TABLE 1, THESE ALSO MAY BE SUBJECT TO ERROR, AND ALMOST CERTAINLY INCLUDE A LARGE SPARES ELEMENT. THESE FIGURES WERE NOT PROVIDED FOR FRANCE, ITALY, OR THE NETHERLANDS SINCE THEY WOULD HAVE BEEN UNRELIABLE, AND BECAUSE LIKE GROUND SUPPORT EQUIPMENT THEY WERE NOT REQUIRED BY THE SPECIFICATION.

7) CONTRACTOR MADE THE REQUEST IN 1974 WHICH IT NOW REPEATS, THAT IT COULD GIVE ASSISTANCE IN THE PREPARATION OF THE QUESTIONNAIRE WHICH MIGHT BE MORE CLOSELY DETERMINED BY THE AVAILABLE DATA IN EUROPE AND IN OTHER AREAS, AND MIGHT AID ECONOMY IN ACQUISITION. BREWSTER

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